



**Completing a Manual Event Enrollment Overview**

This Job Aid provides a walkthrough of the steps an Agency BA must complete to submit a manual benefit event on behalf of the employee. These steps include using the Review BAS Activity page to create the event and the On-Demand Event Maintenance Page to process the event. For qualifying life events not completed through ESS, the employee must submit a life event form along with the supporting documentation to the BA with all the information necessary to complete the benefit enrollment process.

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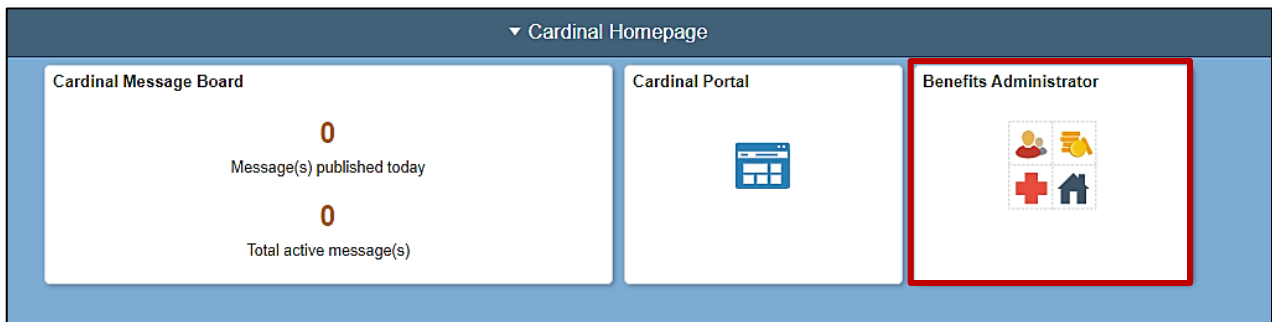
Manual Event for Benefit Enrollment .....2

### Manual Event for Benefit Enrollment

This job aid uses the following example scenario: An employee has submitted a life event form with supporting documentation for a marriage event to their Agency BA. The Agency BA must add the MAR manual event, add the spouse dependent, complete the updated benefit enrollment, and finalize the benefit event.

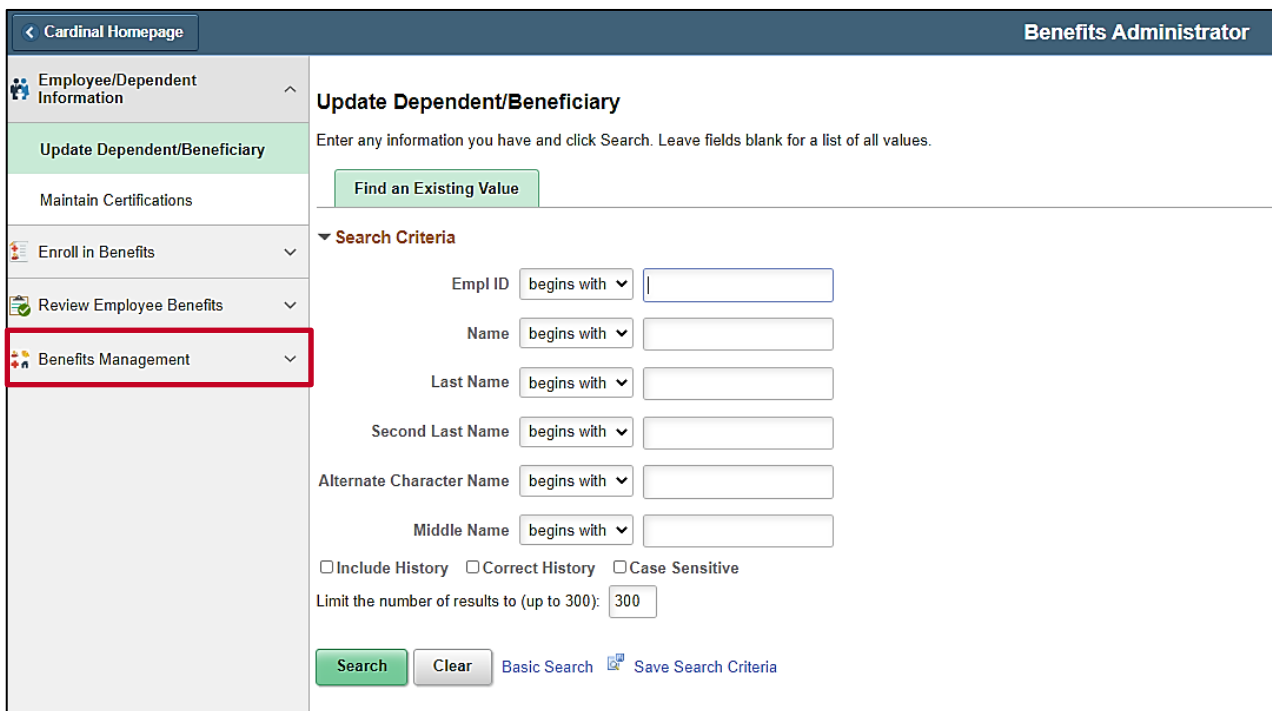
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



2. Click on the **Benefit Administrator** tile on the Cardinal Homepage.

The **Benefits Administration** page displays with the **Employee Dependent/Beneficiary** tab displayed by default.



3. Click the **Benefits Management** list item on the left-hand side of the screen.



## Benefits Job Aid

### BN361 Completing a Manual Event

The **Benefit Management** tab displays.

< Cardinal Homepage Benefits Administrator

Employee/Dependent Information ^

Update Dependent/Beneficiary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID begins with [ ]

Name begins with [ ]

Last Name begins with [ ]

Second Last Name begins with [ ]

Alternate Character Name begins with [ ]

Middle Name begins with [ ]

☐ Include History ☐ Correct History ☐ Case Sensitive

Limit the number of results to (up to 300): [ 300 ]

Search Clear Basic Search Save Search Criteria

4. Click the **Review BAS Activity** list item on the left-hand side of the screen.

The **Review BAS Activity** page displays.

< Cardinal Homepage Benefits Administrator

Review BAS Activity

BAS Activity

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*Empl ID	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date	Event Effseq	*BAS Action	Suppress Forms	COBRA Action	
[ ]	JOHN DOE	Job Data Change		0	0	06/28/2021	0	XFO	[ ]	TER	[-]
[ ]	JOHN DOE	Job Data Change		0	1	06/28/2021	0	HIR	[ ]		[-]
[ ]	Tic Tack	Job Data Change		0	0	01/18/2021	0	LOA	[ ]		[-]
[ ]	JOHN DOE	Job Data Change		0	0	12/01/2020	0	LOA	[ ]		[-]
[ ]	Vitamin Cee	Job Data Change		0	0	03/01/2021	0	DTA	[ ]		[-]
[ ]	Soy Milk	Job Data Change		0	0	03/01/2021	0	DTA	[ ]		[-]
[ ]	Operation Blackops	Job Data Change		0	0	01/18/2021	0	LOA	[ ]		[-]
[ ]	Snow Goose	Job Data Change		0	0	01/18/2021	0	LOA	[ ]		[-]



## Benefits Job Aid

### BN361 Completing a Manual Event

JOHN DOE	Job Data Change		0	0	01/15/2020	0	TER		DEA	
JOHN DOE	Job Data Change		0	0	01/18/2021	0	LOA			
Northern Shoveler	Job Data Change		0	0	01/18/2021	0	LOA			
Black Duck	Job Data Change		0	0	01/18/2021	0	LOA			
Scare Crow	Job Data Change		0	0	03/01/2021	0	DTA			
Apricot Jam	Job Data Change		0	0	02/01/2021	0	LOA			
Jolly Ranchers	Job Data Change		0	0	03/01/2021	0	DTA			

1-30 of 481 | View 100

Save Notify Refresh

**Note:** This page contains two scroll bars. Make sure to scroll all the way down on both the page scroll bar and the table scroll bar before continuing.

- Click the **+** button to add a row.

The **BAS Activity** page refreshes and displays a new row to input data.

Benefits Administrator

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Benefits Management

Review BAS Activity

On-Demand Event Maintenance

Update Event Status

Jergens Lotion	Job Data Change		0	0	03/01/2021	0	DTA			
JOHN DOE	Job Data Change		0	0	01/18/2021	0	LOA			
JOHN DOE	Job Data Change		0	0	01/15/2020	0	TER		DEA	
JOHN DOE	Job Data Change		0	0	01/18/2021	0	LOA			
Northern Shoveler	Job Data Change		0	0	01/18/2021	0	LOA			
Black Duck	Job Data Change		0	0	01/18/2021	0	LOA			
Scare Crow	Job Data Change		0	0	03/01/2021	0	DTA			
Apricot Jam	Job Data Change		0	0	02/01/2021	0	LOA			
Jolly Ranchers	Job Data Change		0	0	03/01/2021	0	DTA			
Cesar Seled	Job Data Change		0	0	01/18/2021	0	LOA			
	Manual Event	<input checked="" type="checkbox"/>	0	0	08/27/2021					

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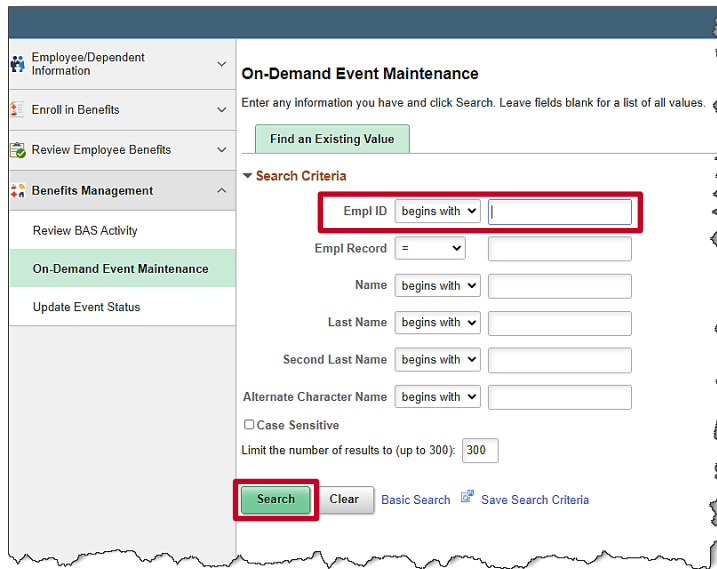
Save Notify Refresh

- Enter the **Empl ID**.
- The Effective Date defaults to today's date. Enter the **Effective Date** for the Manual Event accordingly.
- Enter the **BAS Action** for the Marriage Life Event. The magnifying glass can be used to search for the BAS Action if unknown.

**Note:** If the manual life event for the employee involves a dependent losing coverage (e.g., a DIV event), the BA has to also fill out the COBRA code associated to that manual event on the **BAS Activity** page.

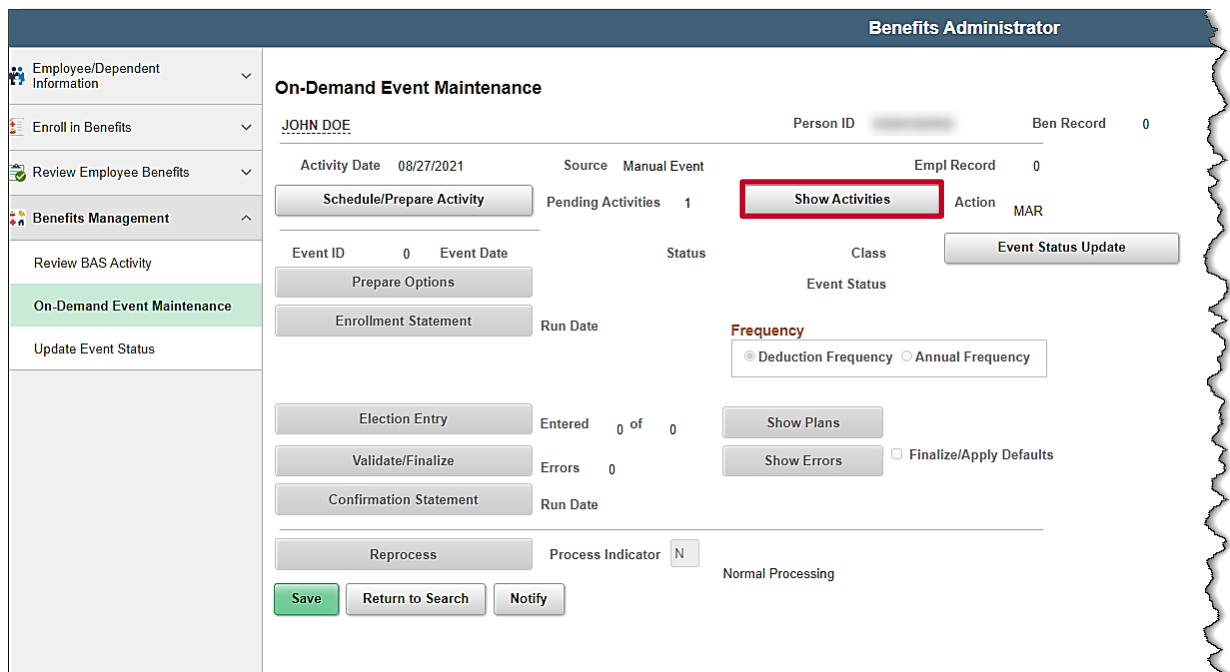
- Click **Save**.
- Click on the **On-Demand Event Maintenance** list item on the left-hand side of the screen.

The **On-Demand Event Maintenance** page displays.



11. Enter the **Empl ID** in the corresponding search box.
12. Click **Search**.

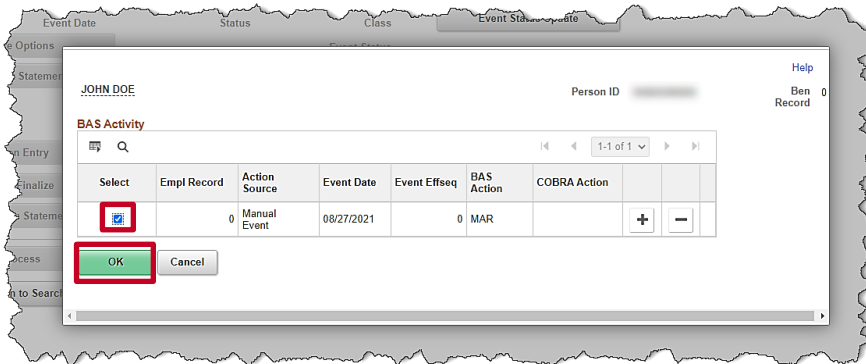
The **On-Demand Event Maintenance** page displays for the Employee.



**Note:** If there is a delay between creating the event on the Review BAS Activity page and navigating to the On-Demand Event Maintenance page, the Benefits Administration process may have run, which would schedule the activity for you. In this case, skip to Step 18.

13. Click on the **Show Activities**.

The **Bas Activity** table pop up displays.



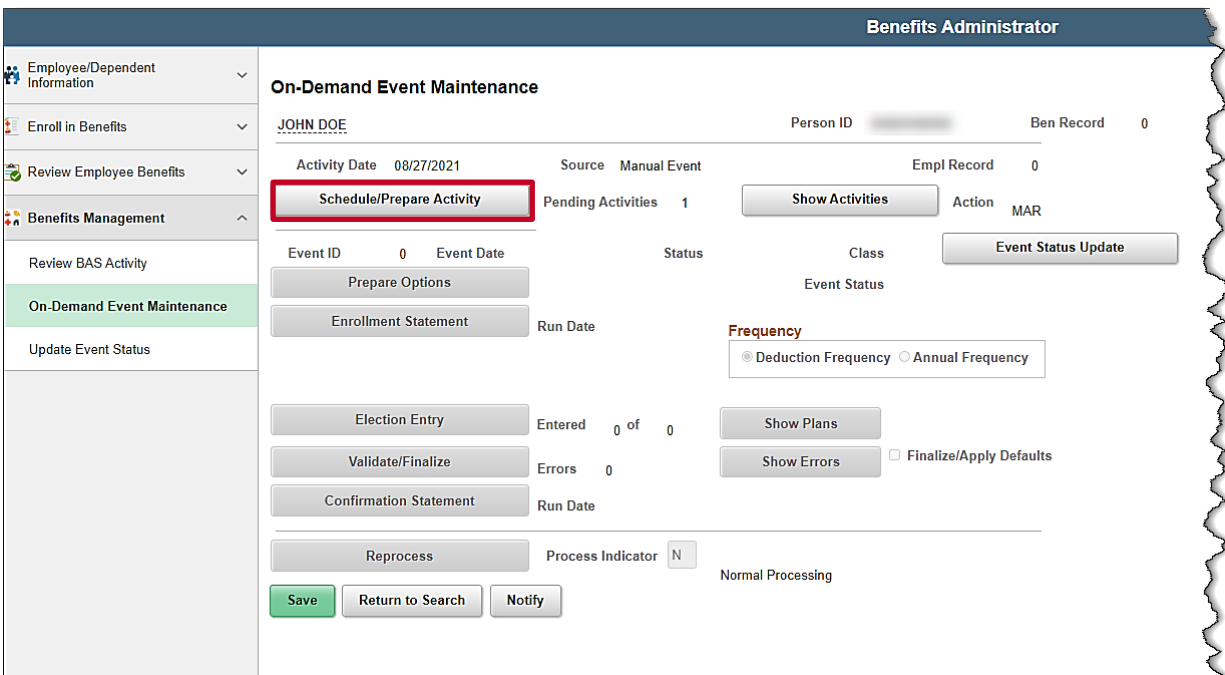
Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	08/27/2021	0	MAR	

OK Cancel

14. Confirm that the manual event just added (MAR) has a check in the checkbox.

15. Click **OK**.

The **On-Demand Event Maintenance** page returns.



**Benefits Administrator**

**On-Demand Event Maintenance**

JOHN DOE Person ID Ben Record 0

Activity Date 08/27/2021 Source Manual Event Empl Record 0

**Schedule/Prepare Activity** Pending Activities 1 Show Activities Action MAR

Event ID 0 Event Date Status Class Event Status

Prepare Options Enrollment Statement Run Date

Frequency  
☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

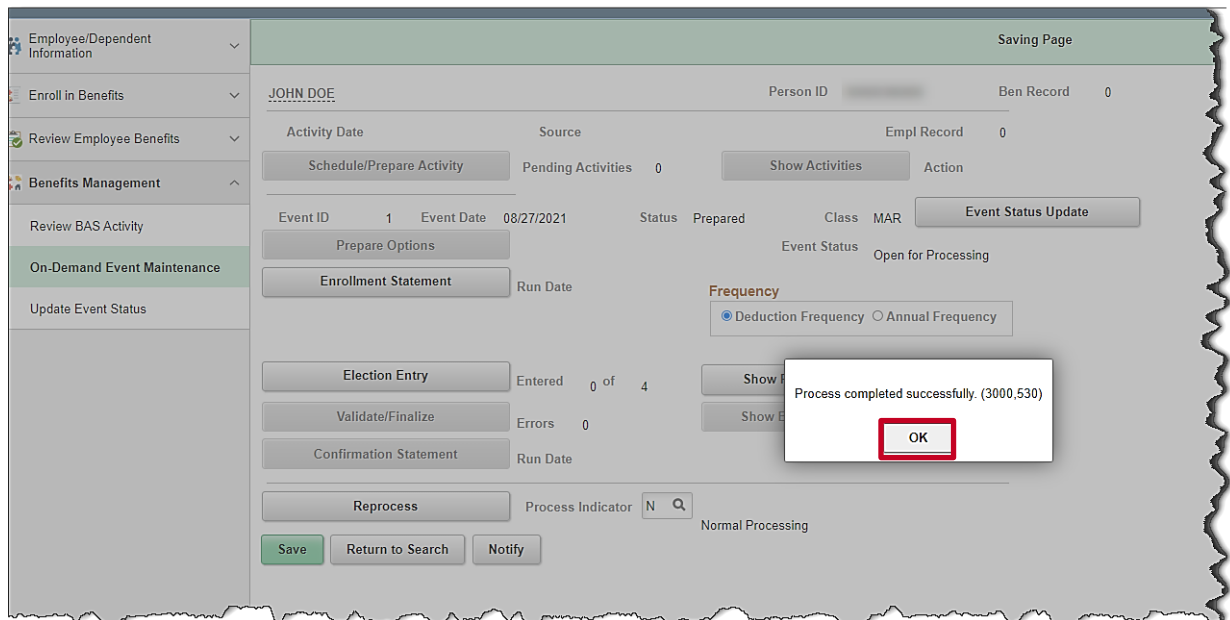
Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

16. Click on the **Schedule/Prepare Activity** button to initiate the automated programming process that schedules and prepares pending activity and opens election entry for this event.

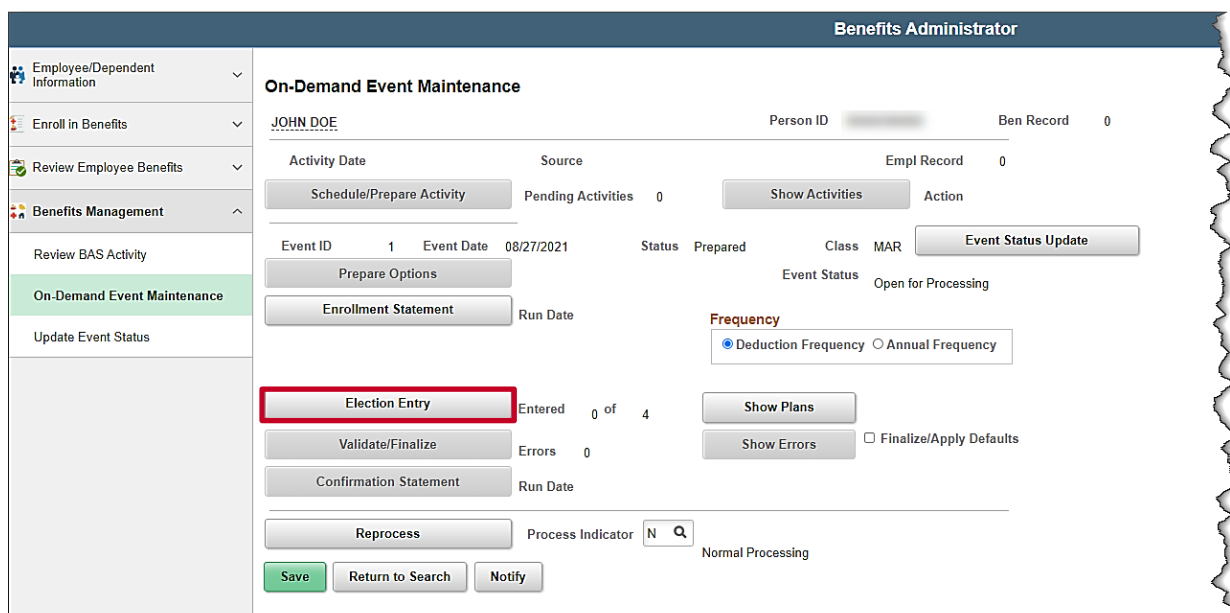
The page refreshes with the following pop-up window.



The screenshot shows the 'On-Demand Event Maintenance' page for employee JOHN DOE. A pop-up window is displayed in the center with the message 'Process completed successfully. (3000,530)' and an 'OK' button. The background page shows various buttons like 'Schedule/Prepare Activity', 'Event Status Update', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Reprocess', 'Save', 'Return to Search', and 'Notify'. The 'Event ID' is 1, 'Event Date' is 08/27/2021, and 'Status' is Prepared.

17. Click **OK**.

The **On-Demand Event Maintenance** page returns.



The screenshot shows the 'On-Demand Event Maintenance' page for employee JOHN DOE. The 'Election Entry' button is highlighted with a red rectangle. The page layout is similar to the previous screenshot, showing buttons for 'Schedule/Prepare Activity', 'Event Status Update', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Reprocess', 'Save', 'Return to Search', and 'Notify'. The 'Event ID' is 1, 'Event Date' is 08/27/2021, and 'Status' is Prepared.

18. Click on the **Election Entry** button to open the benefit admin election pages.



## Benefits Job Aid

### BN361 Completing a Manual Event

The **Option Election** page will display.

BenAdmin Data Entry

Event / Participant Selection | **Option Election** | Dependents / Beneficiaries

Sched ID EM00 Empl ID [REDACTED] JOHN DOE Ben Record 0 Event ID 1  
Event Data 08/27/2021 Marriage Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ①

Plan Type 10 : Medical

Option Code 33   COVA Care + Expanded Dental (ACC2) (Single)

Health Provider ID  ☐ Previously Seen [Special Requirements](#)

Dependents/Beneficiaries

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
<input type="text"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="button" value="Q"/>						
<input type="button" value="+"/>						

19. Click on the magnifying glass next to **Option Code** under the **Plan Type 10: Medical** section.

The **Option Code** options display for the Plan Type 10: Medical.

Look Up Option Code

[Help](#)

Search Results

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Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1
18	Option	CHD1	2
19	Option	CHD1	3
2	Option	CHA	2
20	Option	CHD1	4

20. Select the same type of plan the employee currently has but with a **Coverage Code 4** (Family coverage).





## Benefits Job Aid

### BN361 Completing a Manual Event

The **Election Entry** page returns.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The top navigation bar includes 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. Below the navigation bar, the following information is displayed: Schedule ID EM00, Employee ID [redacted] JOHN DOE, Ben Record 0, Event ID 1, Event Data 08/27/2021 Marriage, Excess Credit Rollover To, and Forfeit Excess Credits. The main content area is titled 'Available Plans and Options' and shows 'Plan Type 10 : Medical'. Under this plan, the 'Option Code' is 36, and the plan name is 'COVA Care + Expanded Dental (ACC2) (Family)'. There is a 'Health Provider ID' field and a 'Previously Seen' checkbox. A 'Special Requirements' link is also present. Below this, the 'Dependents/Beneficiaries' section has an 'Enroll All' button. At the bottom, there is a table with the following columns: ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. The table is currently empty.

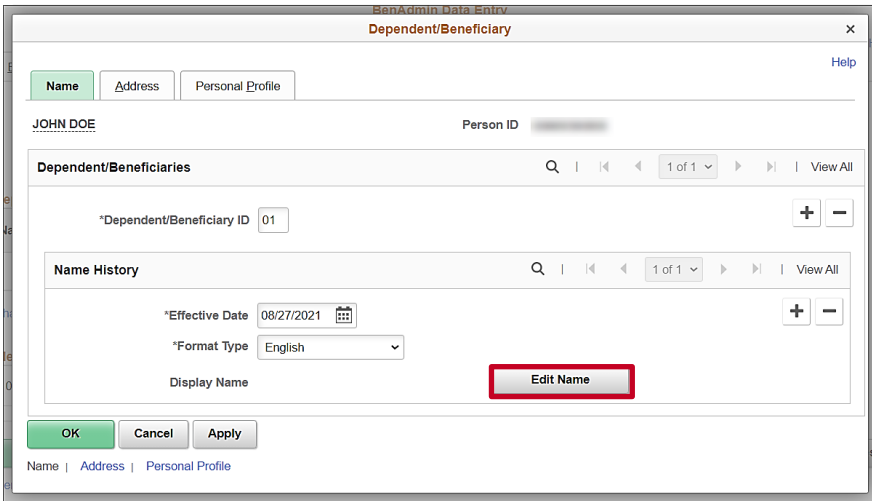
21. Click on the **Dependents/Beneficiaries** tab.

The **Dependent/Beneficiary** tab displays.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The top navigation bar includes 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. Below the navigation bar, the following information is displayed: Schedule ID EM00, Employee ID [redacted] JOHN DOE, Ben Record 0, Event ID 1, Event Data 08/27/2021 Marriage, Excess Credit Rollover To, and Forfeit Excess Credits. The main content area is titled 'Dependent/Beneficiaries Currently on Record' and shows a table with the following columns: Name, Relationship to Employee, Dependent Beneficiary Type, and Date of Birth. The table is currently empty. Below the table, there is a 'Change/Add Dependent Data' hyperlink. At the bottom, there is a section titled 'Elections Requiring Supplemental Information' with a dropdown menu showing '10' and 'Medical'. There is also an 'Enroll Dependents' button. At the bottom of the window, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.

22. Click on the **Change/Add Dependent Data** hyperlink to add the dependent to the employee record.

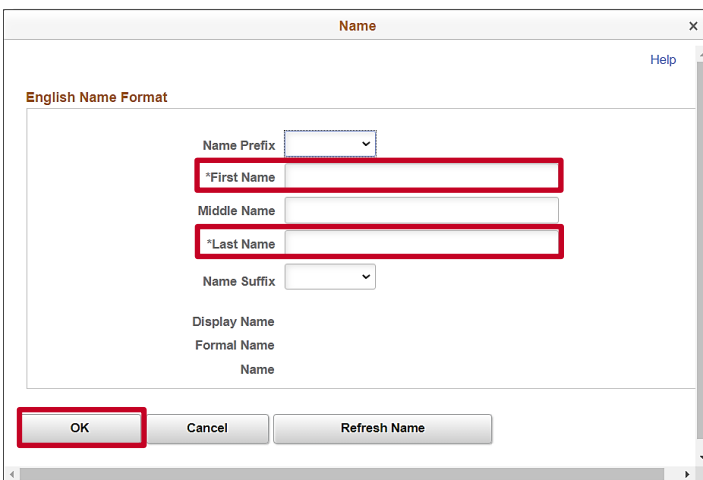
The **Dependent Data** page pop up displays.



**Note:** Confirm that the effective date of the Dependent/Beneficiary is on or before the Event Date. Otherwise, the dependent will not display when they employee is trying to select the dependent for coverage on the Option Election page.

23. Click on **Edit Name**.

The **Name** page pop-up displays.

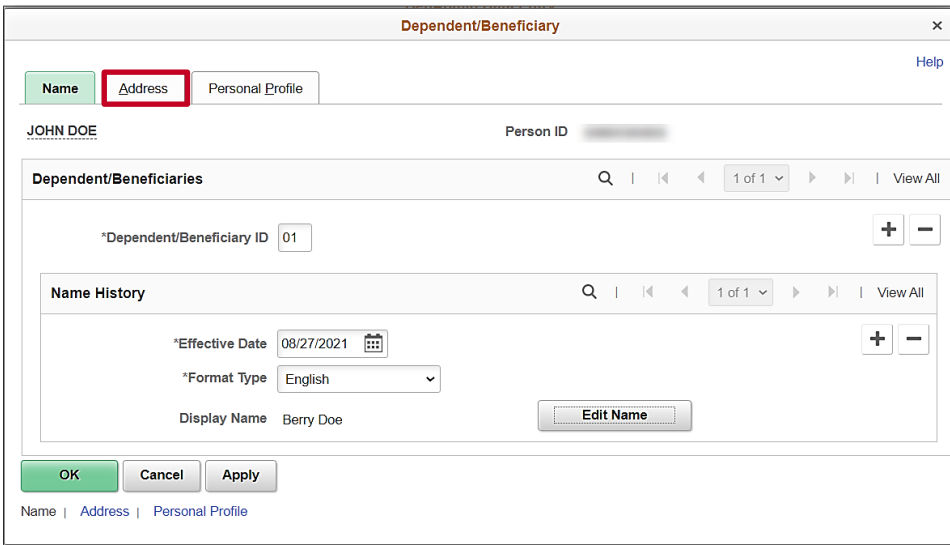


24. Enter the **First Name** and **Last Name**. The other fields are optional.

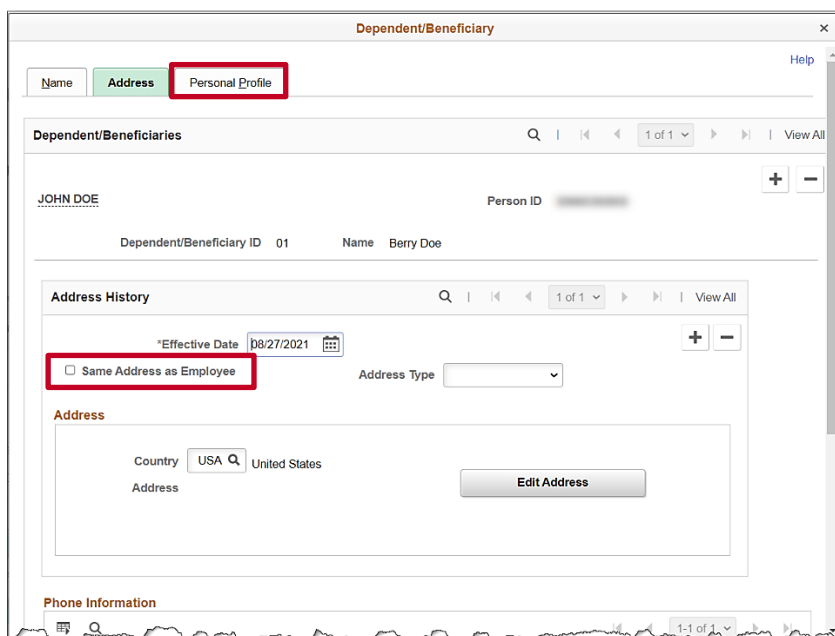
25. Click **OK**.

**Note:** The dependent's name will now show next to the **Display Name** field.

The **Dependent Information** page returns.



The **Address** page displays.

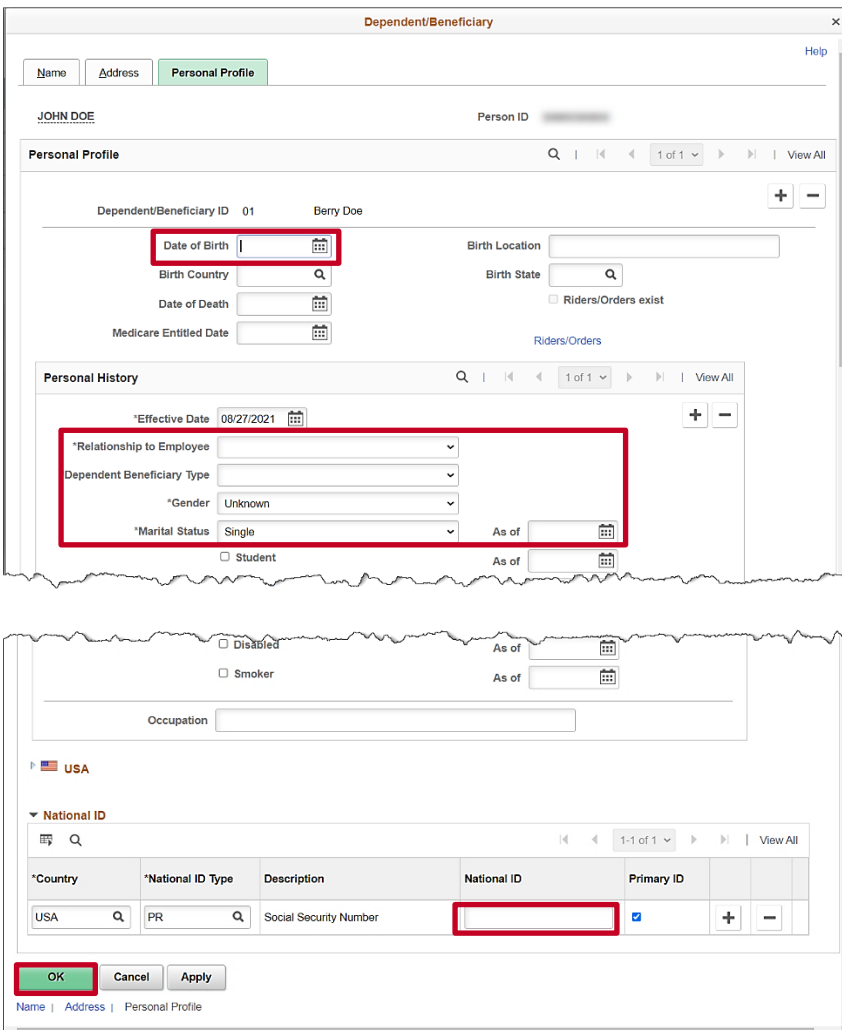


26. Check the box next to **Same Address as Employee**.

**Note:** If the Agency BA receives a **Phone Number** and/or **Email Address** for the dependent, this is the page used to enter that information. For this example, there is no information for Phone or Email. These fields are not required.

27. Click on **Personal Profile** tab.

The **Personal Profile** page displays.



Dependent/Beneficiary ID 01 Berry Doe

**Personal Profile**

Date of Birth  Birth Location

Birth Country  Birth State

Date of Death  ☐ Riders/Orders exist

Medicare Entitled Date

**Personal History**

\*Effective Date 08/27/2021

\*Relationship to Employee

Dependent Beneficiary Type

\*Gender Unknown

\*Marital Status Single As of

☐ Student As of

☐ Disabled As of

☐ Smoker As of

Occupation

USA

**National ID**

*Country	*National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	<input type="text"/>	<input checked="" type="checkbox"/>

OK Cancel Apply

28. Enter the **Date of Birth** for the dependent.

29. Click the **Relationship to Employee** dropdown and select **Spouse**.

30. Select **Approved Dependent** from the drop down next to **Dependent Beneficiary Type**.

31. Select the **Gender** from the drop-down menu.

32. Change the **Marital Status** to **Married**. The **As of** date will automatically be set to the effective date of the event. Agency BAs can update this field as needed.

**Note:** If any additional information was provided by the employee for the dependent, enter it on this page. The Student and Smoker checkboxes are not used on this page.

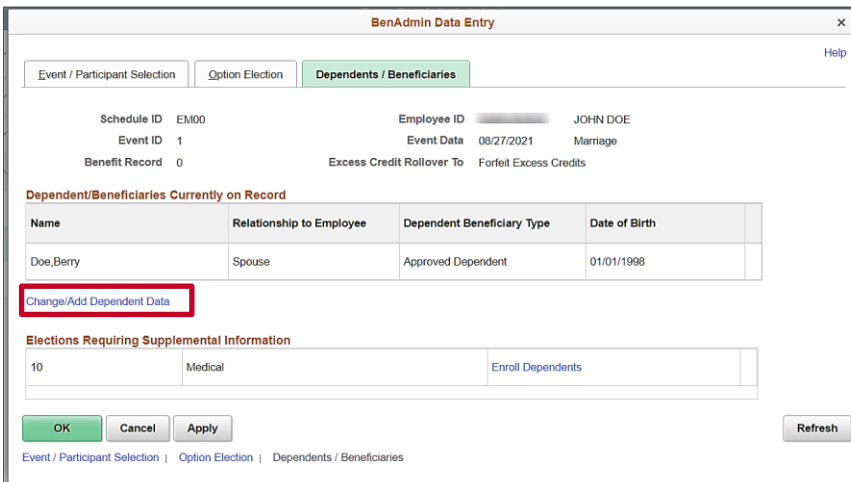
**Note:** As a reminder, if the employee's Marital Status is affected by the Manual Life Event, the Agency BA will need to contact the Agency HR Admin to complete the personal data update accordingly.

33. Enter the **National ID** for the dependent.

**Note:** If the employee has not provided a dependent's SSN, the Agency BA should leave the field blank. However, when the SSN becomes available, the employee or Agency BA should enter it as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. As they do today, agencies should make at least three attempts at obtaining the dependents SSN. Agencies can use the **Base Benefits Consistency Audit** to monitor dependents missing an SSN.

34. Click **OK**.

The **BenAdmin Data Entry** page displays.



**BenAdmin Data Entry**

Event / Participant Selection | Option Election | **Dependents / Beneficiaries** | [Help](#)

Schedule ID: EM00 | Employee ID: [REDACTED] | JOHN DOE  
 Event ID: 1 | Event Data: 08/27/2021 | Marriage  
 Benefit Record: 0 | Excess Credit Rollover To: Forfeit Excess Credits

**Dependent/Beneficiaries Currently on Record**

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Doe, Berry	Spouse	Approved Dependent	01/01/1998

[Change/Add Dependent Data](#)

**Elections Requiring Supplemental Information**

10 | Medical | [Enroll Dependents](#)

**Buttons:** OK, Cancel, Apply, Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

35. Click the **Change/Dependent Data** hyperlink to add another dependent. For this example, the employee's marriage also included a stepchild that has to be added as an additional dependent.



## Benefits Job Aid

### BN361 Completing a Manual Event

The **Dependent Information** page displays.

**Dependent/Beneficiary**

[Name](#) | [Address](#) | [Personal Profile](#)

[Help](#)

**JOHN DOE** Person ID [REDACTED]

**Dependent/Beneficiaries** 1 of 1 View All

\*Dependent/Beneficiary ID b1 **+** **-**

**Name History** 1 of 1 View All

\*Effective Date 08/27/2021 **+** **-**

\*Format Type English

Display Name Berry Doe **Edit Name**

**OK** **Cancel** **Apply**

[Name](#) | [Address](#) | [Personal Profile](#)

36. Click on the “+” button to add an additional dependent.

37. Repeat steps 20 – 32.

**Note:** Make sure to select **Stepchild**, if appropriate, for **Relationship to Employee** field on the **Personal Profile** tab.



## Benefits Job Aid

### BN361 Completing a Manual Event

The **BenAdmin Data Entry** page displays.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The 'Event / Participant Selection' tab is also visible. The 'Dependents / Beneficiaries' tab is highlighted in green. The page displays the following information:

- Schedule ID: EM00
- Employee ID: [REDACTED] JOHN DOE
- Event ID: 1
- Event Data: 08/27/2021 Marriage
- Benefit Record: 0
- Excess Credit Rollover To: Forfeit Excess Credits

**Dependent/Beneficiaries Currently on Record**

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Doe,Berry	Spouse	Approved Dependent	01/01/1998
Lance,Bob	Stepchild	Approved Dependent	09/02/2005

[Change/Add Dependent Data](#)

**Elections Requiring Supplemental Information**

10	Medical	<a href="#">Enroll Dependents</a>
----	---------	-----------------------------------

Buttons: OK, Cancel, Apply, Refresh

Navigation: [Event / Participant Selection](#) | [Option Election](#) | [Dependents / Beneficiaries](#)

38. Confirm that both dependents display under the **Dependent/Beneficiaries Currently on Record** section.
39. Click on the **Option Election** tab.

The **Option Election** page displays.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The 'Event / Participant Selection' tab is also visible. The 'Dependents / Beneficiaries' tab is highlighted in green. The page displays the following information:

- Sched ID: EM00
- Empl ID: [REDACTED] JOHN DOE
- Ben Record: 0
- Event ID: 1
- Event Data: 08/27/2021 Marriage
- Excess Credit Rollover To: Forfeit Excess Credits

**Available Plans and Options**

Plan Type 10 : Medical

Option Code:  [COVA Care + Expanded Dental \(ACC2\) \(Family\)](#)

Health Provider ID:  ☐ Previously Seen

[Special Requirements](#)

**Dependents/Beneficiaries**

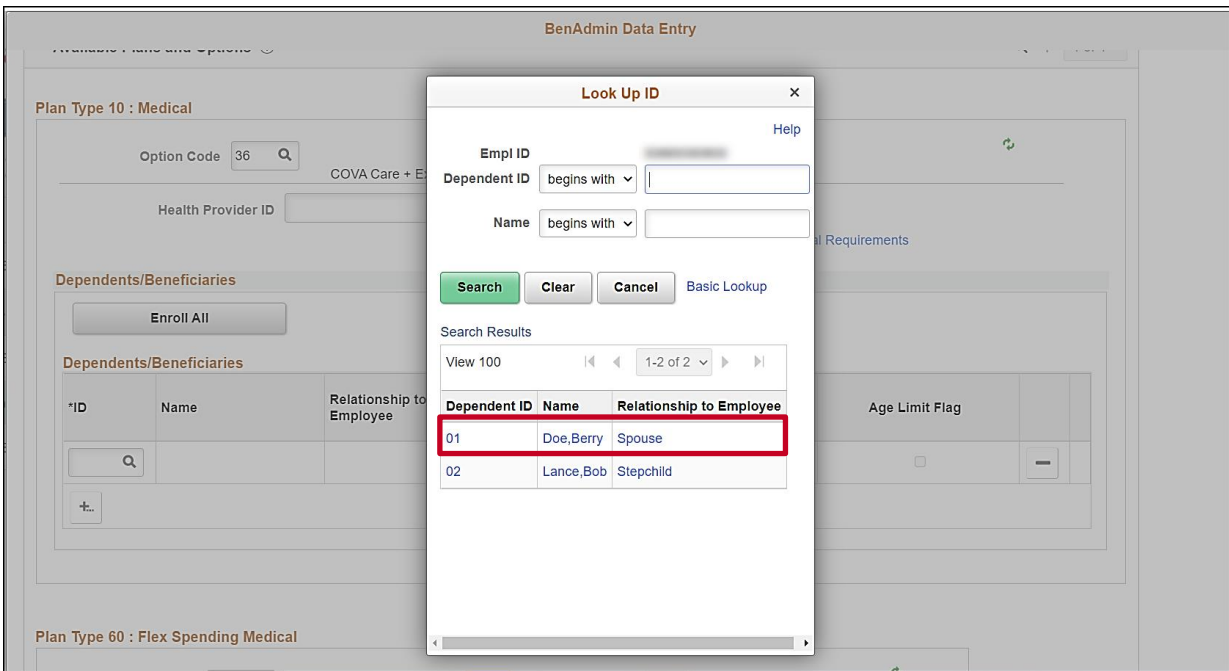
[Enroll All](#)

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
<input type="text" value="B6"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>

40. Click on the magnifying glass under **\*ID** field.

**Note:** To add dependents to **Plan Type 10: Medical** Family coverage you can either click on **Enroll All** or add them one by one individually. For this scenario, we will show how to add them one by one.

The **Look Up ID** page pop up displays.



**Look Up ID**

Empl ID

Dependent ID begins with

Name begins with

**Search** **Clear** **Cancel** [Basic Lookup](#)

Search Results

View 100 1-2 of 2

Dependent ID	Name	Relationship to Employee
01	Doe,Berry	Spouse
02	Lance,Bob	Stepchild

41. Click on the dependent you want to enroll in the medical plan benefits. In this example it would be the **Spouse**.





## Benefits Job Aid

### BN361 Completing a Manual Event

The **Option Election** page returns.

Plan Type 10 : Medical

Option Code 36

COVA Care + Expanded Dental (ACC2) (Family)

Health Provider ID  ☐ Previously Seen

[Special Requirements](#)

Dependents/Beneficiaries

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01 <input type="text"/> <input type="button" value="Q"/>	Berry Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="-"/>
<input type="button" value="+"/>							

Plan Type 60 : Flex Spending Medical

42. Click on the “+” button under \*ID 01.

The **Option Election** page refreshes with an additional row under **Dependents/Beneficiary** section.

Plan Type 10 : Medical

Option Code 36

COVA Care + Expanded Dental (ACC2) (Family)

Health Provider ID  ☐ Previously Seen

[Special Requirements](#)

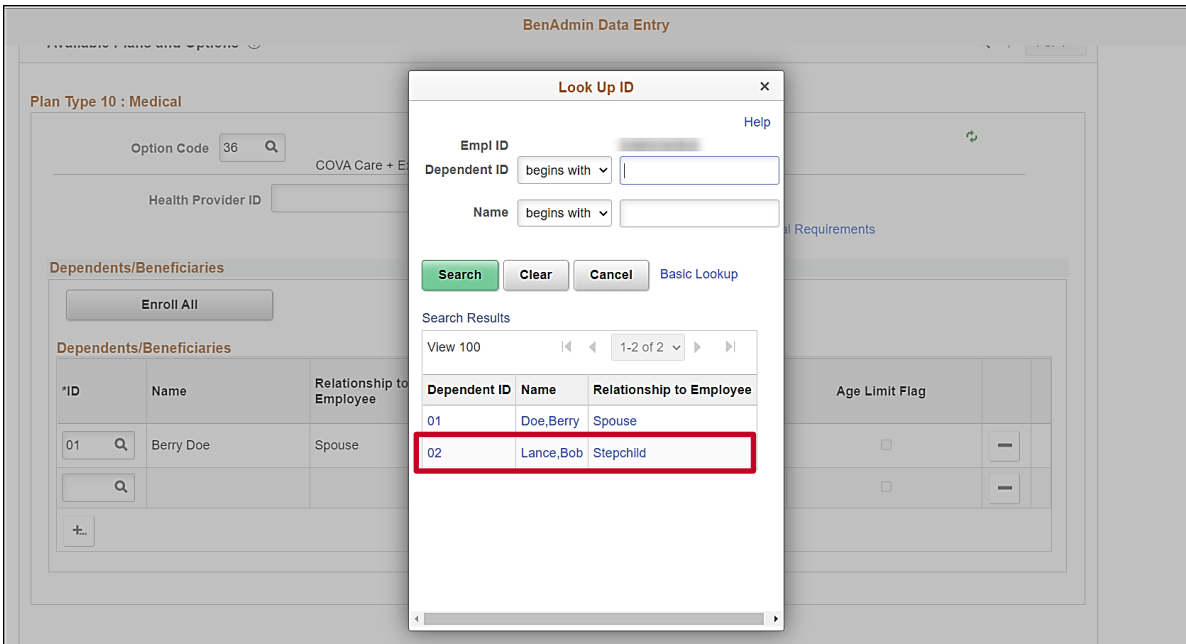
Dependents/Beneficiaries

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01 <input type="text"/> <input type="button" value="Q"/>	Berry Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="-"/>
<input type="text"/> <input type="button" value="Q"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="button" value="-"/>
<input type="button" value="+"/>							

43. Click on the magnifying glass under the listed dependent.

The **Look Up ID** page pop up displays.



**Look Up ID**

Empl ID

Dependent ID begins with

Name begins with

**Search** **Clear** **Cancel** [Basic Lookup](#)

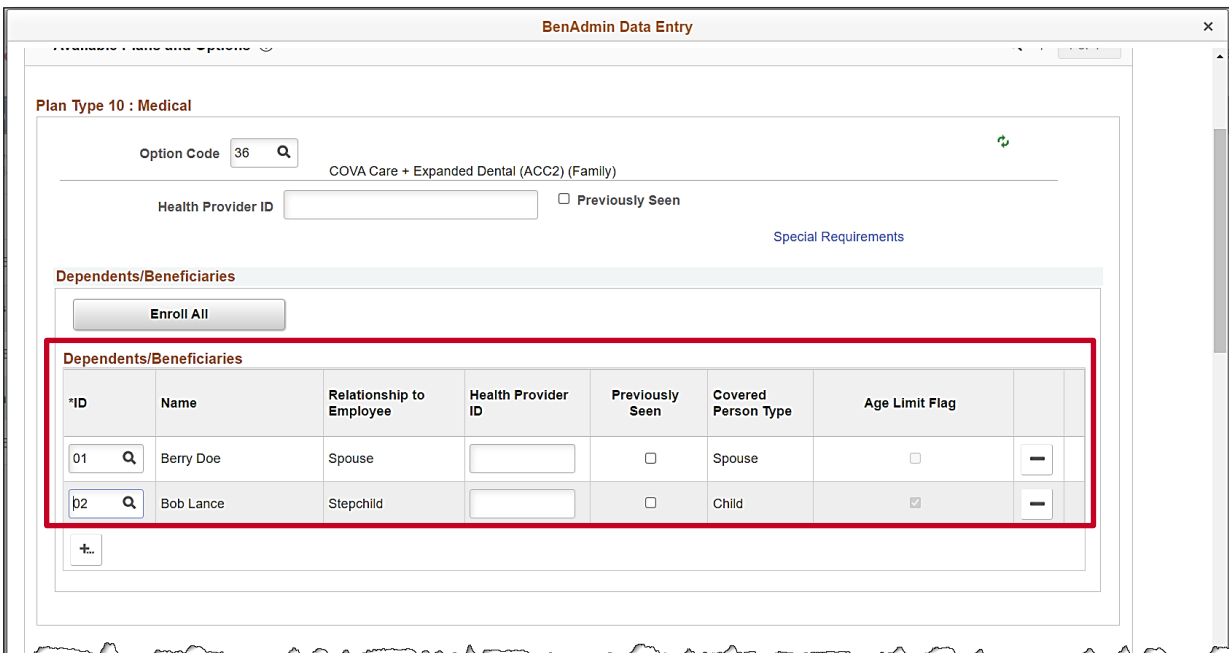
Search Results

View 100 | 1-2 of 2

Dependent ID	Name	Relationship to Employee
01	Doe,Berry	Spouse
02	Lance,Bob	Stepchild

44. Click on the second dependent listed. In this example it would be the **Stepchild**.

The **Option Election** page returns.



**BenAdmin Data Entry**

Plan Type 10 : Medical

Option Code 36

COVA Care + Expanded Dental (ACC2) (Family)

Health Provider ID  ☐ Previously Seen

[Special Requirements](#)

**Dependents/Beneficiaries**

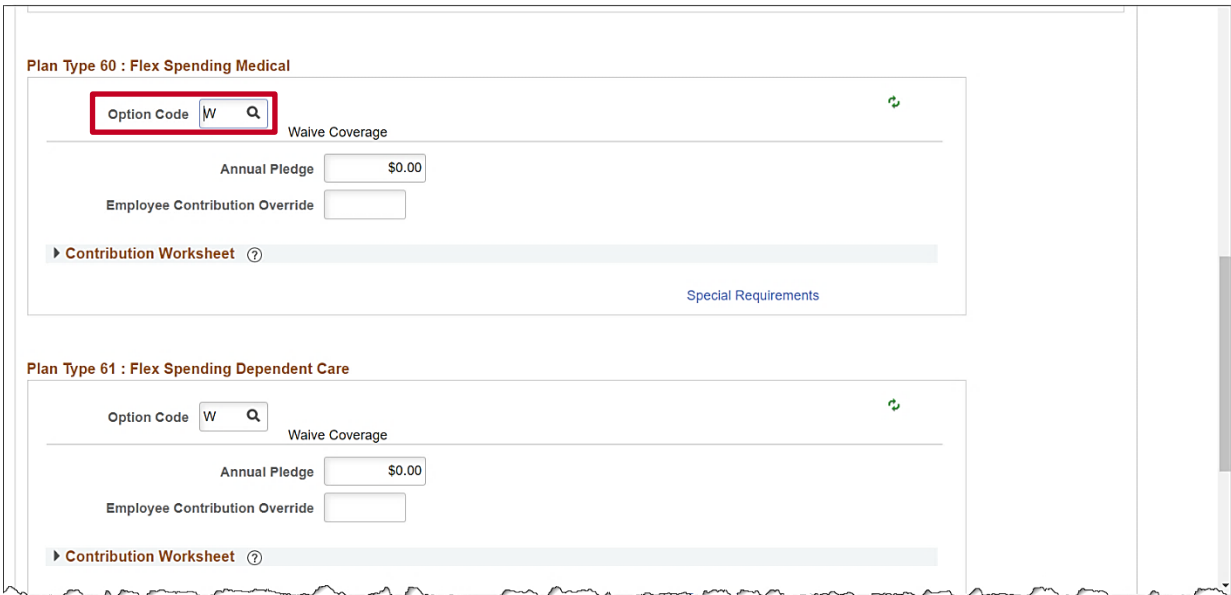
**Enroll All**

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Berry Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Bob Lance	Stepchild	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

45. Confirm that all dependents that should be enrolled in the medical plan coverage for the employee are listed under the **Dependent/Beneficiaries** section.

46. Scroll down to **Plan Type 60: Flexible Spending Medical**.

The **Plan Type 60: Flex Spending Medical** section displays.

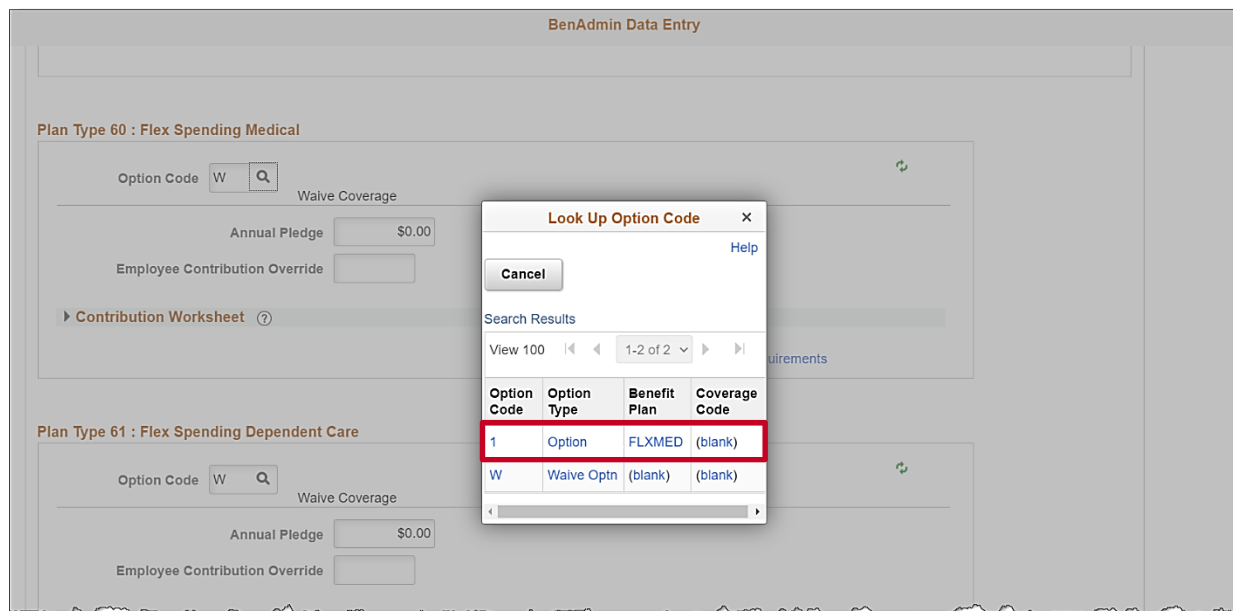


**Note:** The Plan Types available on the **Option Election** tab are determined by the employee's benefit eligibility. Cardinal has embedded configurations based on the Commonwealth's program rules.

47. Click on the magnifying glass under Plant Type 60: Flex Spending Medical **Option Code**.

**Note:** If a plan type is left blank, the system will automatically waive that coverage.

The **Look Up Option Code** pop up displays.



Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	FLXMED	(blank)
W	Waive Optn	(blank)	(blank)

48. Click on **Option 1**.



## Benefits Job Aid

### BN361 Completing a Manual Event

The **Election Entry** page returns.

BenAdmin Data Entry

Plan Type 60 : Flex Spending Medical

Option Code

Medical Flex Spending Account (FLXMED)

Annual Pledge

Employee Contribution Override  Monthly

▼ Contribution Worksheet ?

Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

Annual Pledge	Contributions YTD	Pay Periods Remaining	Pay Period Amount	Employee Contribution
( <input type="text" value="\$0.00"/> -	<input type="text" value="\$0.00"/> /	<input type="text" value="8"/> =	<input type="text" value="\$0.00"/> =	<input type="text" value="\$0.00"/> Monthly

Open protected fields for change. (These fields are normally determined by the system).

[Special Requirements](#)

Plan Type 61 : Flex Spending Dependent Care

49. Input the amount (specified by the employee) for **Annual Pledge** for Flex Spending Medical. For this example, we will elect \$300 for the Annual Pledge.

**Note:** The Benefit Administrator can input the Pay Period Amount in the Contribution Worksheet and click on **Calculate** to determine what the annual pledge would be. Once determined, the BA must enter the **Annual Pledge** amount above under Option Code.

50. Scroll down to **Plan Type 61: Flex Spending Dependent Care**.

The **Plan Type 61: Flex Spending Dependent Care** section displays.

[Special Requirements](#)

Plan Type 61 : Flex Spending Dependent Care

Option Code

Waive Coverage

Annual Pledge

Employee Contribution Override

► Contribution Worksheet ?

[Special Requirements](#)

Plan Type AZ : Flex Spending Admin Fee

Option Code

Waive Coverage

[Special Requirements](#)



## Benefits Job Aid

### BN361 Completing a Manual Event

51. Click on the magnifying glass under Plan Type 61: Flex Spending Dependent Care **Option Code**. For this scenario the employee has elected Flex Spending Dependent Care.

The **Look Up Option Code** pop up displays.

Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	FLXDCR	(blank)
W	Waive Optn	(blank)	(blank)

52. Click on **Option 1**.

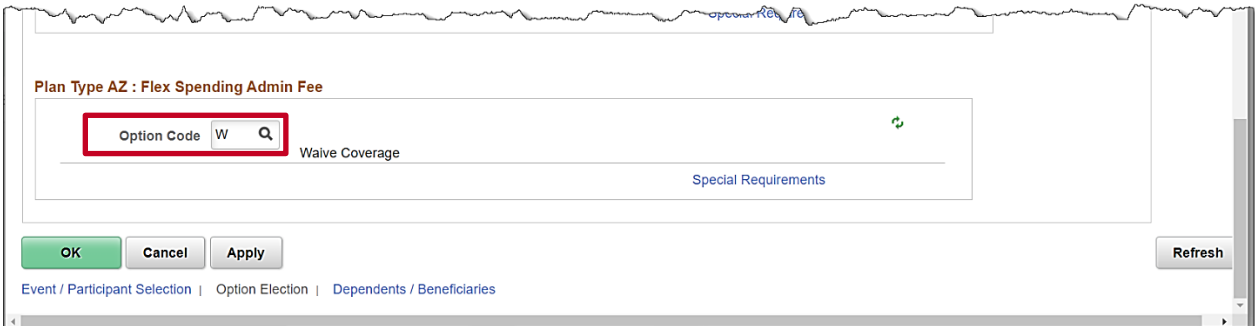
The **Election Entry** page returns.

Annual Pledge	Contributions YTD	Pay Periods Remaining	Pay Period Amount	Employee Contribution
( \$0.00 )	\$0.00	8	\$0.00	\$0.00 Monthly

53. Input the amount (specified by the employee) for **Annual Pledge** for Flex Spending Dependent Care. For this example, we will elect \$250 for the Annual Pledge Scroll down to **Plan Type 61: Flex Spending Dependent Care**.

54. Scroll down to **Plan Type AZ: Flex Spending Admin Fee**.

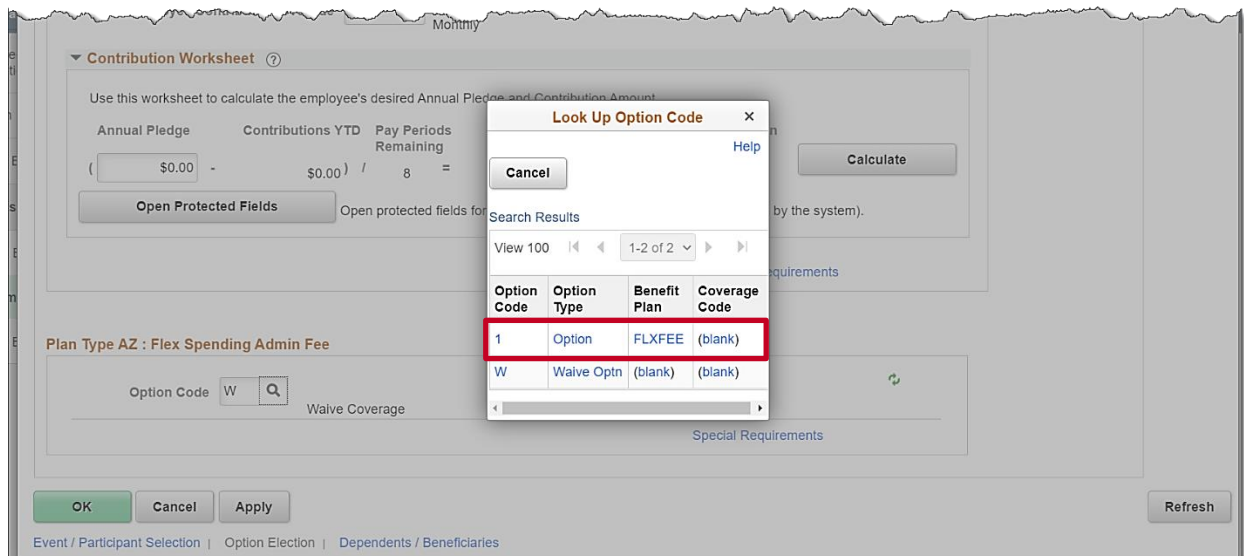
The **Plan Type AX: Flex Spending Admin Fee** section displays.



55. Click on the magnifying glass under Plan Type AZ: Flex Spending Admin Fee **Option Code**.

**Note:** If the employee has elected a Flex Spending Medical amount, the Flex Spending Admin Fee must be elected as well. If the BA forgets to elect the Fee, the system will give them an error.

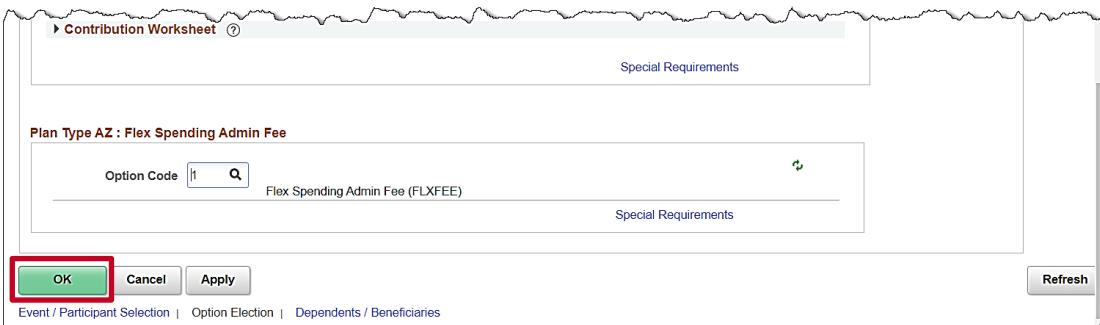
The **Look Up Option Code** pop up displays.



Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	FLXFEE	(blank)
W	Waive Optn	(blank)	(blank)

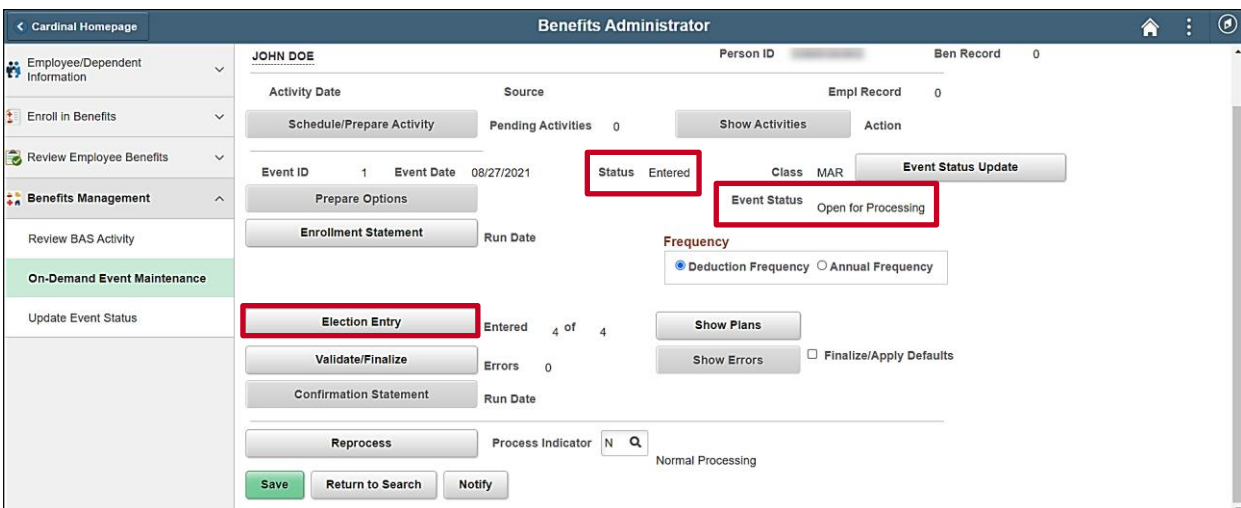
56. Click on **Option 1**.

The **Election Entry** page returns.



57. Click **OK**.

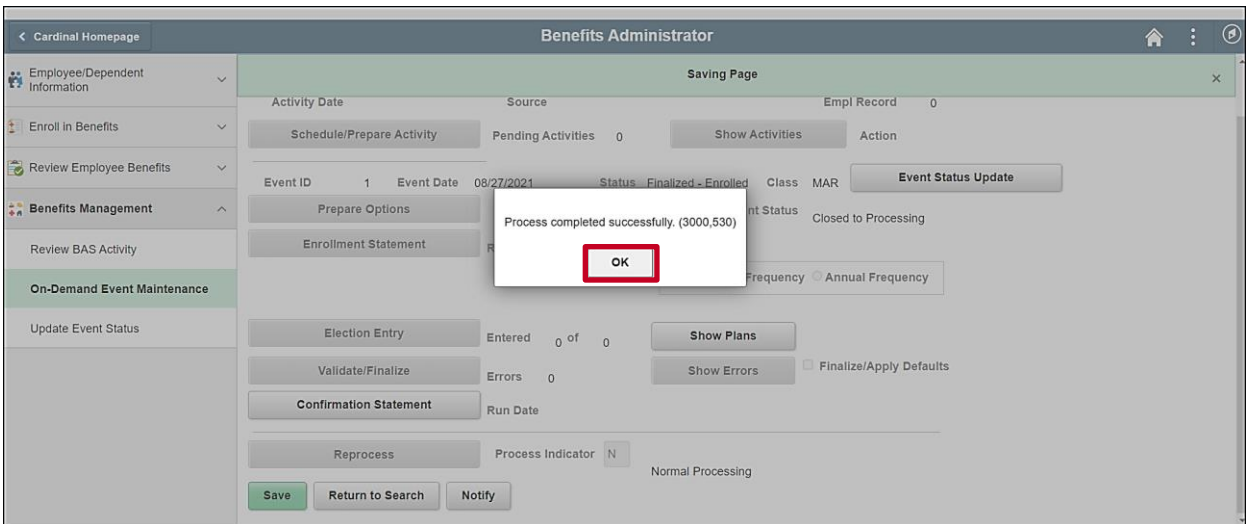
The **On-Demand Event Maintenance** page returns.



58. Confirm the **Status** is **Entered**, and the **Event Status** is **Open for Processing**.

59. Click on **Validate/Finalize** button to execute the programming process to validate elections, close the event, and update the Base Benefits Tables.

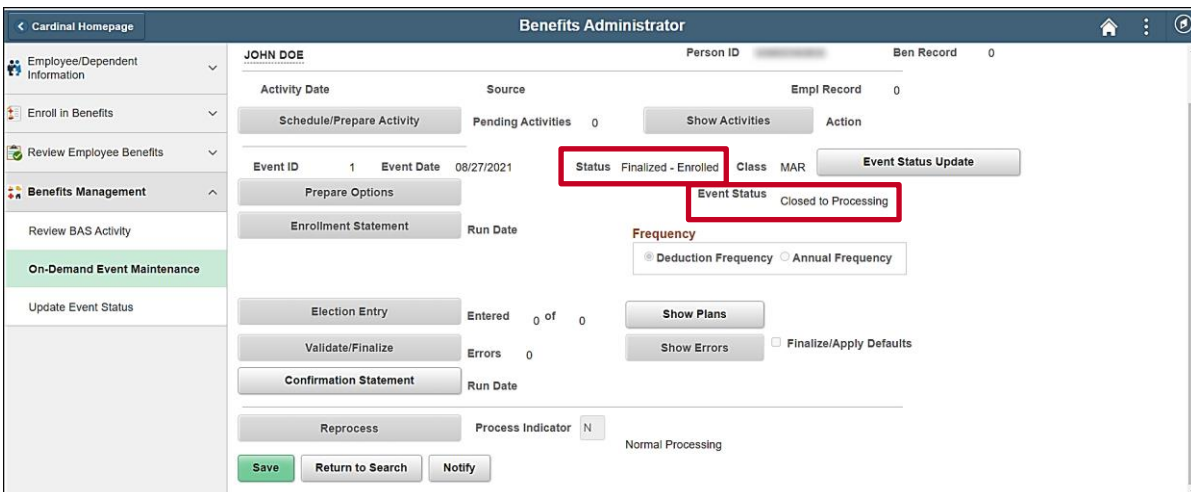
The page refreshes with the following pop-up window.



The screenshot shows the 'Benefits Administrator' interface. A modal dialog box is displayed in the center with the text 'Process completed successfully. (3000,530)' and an 'OK' button. The background interface includes a sidebar with navigation options like 'Employee/Dependent Information', 'Enroll in Benefits', 'Review Employee Benefits', 'Benefits Management', 'Review BAS Activity', 'On-Demand Event Maintenance', and 'Update Event Status'. The main content area shows details for an event with ID 1, dated 08/27/2021, with a status of 'Finalized - Enrolled' and a class of 'MAR'. There are various buttons for actions like 'Schedule/Prepare Activity', 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Reprocess', 'Save', 'Return to Search', and 'Notify'.

60. Click **OK**.

The **On-Demand Event Maintenance** page refreshes and returns.



The screenshot shows the 'Benefits Administrator' interface after the process completion. The 'On-Demand Event Maintenance' page is active. It displays details for 'JOHN DOE' with Person ID and Ben Record 0. The event details show 'Status: Finalized - Enrolled' and 'Event Status: Closed to Processing', both highlighted with red boxes. The interface includes the same sidebar and main content area as the previous screenshot, with buttons for 'Schedule/Prepare Activity', 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Reprocess', 'Save', 'Return to Search', and 'Notify'.

61. Confirm the **Status** is **Finalized – Enrolled** and the **Event Status** is **Closed to Processing**.